Step	Accountability	Sub-processes / Activities	Inputs and Outputs	Cycle Time
9	BCCM CCCM	**CONDUCT RELEASE PACKAGE MEETING** 1. Prepare agenda 2. Make meeting preparations 3. Evaluate proposed release schedule 4. Each company presents proposed changes to the Candidate Request List 5. If needed - Make recommendations for changes to proposed release schedule. 6. Non-scheduled Change Requests returned to Step 5 as Input for the "Prepare for Enhancement Review Meeting" process. 7. Based on BST/CLEC consensus create Approved Release Package 8. Identify Release Management Project Manager, if possible 9. Establish date for initial Release Management Project Meeting	**INPUTS:** • BellSouth's Proposed Release Schedule • Change Request Log **OUTPUTS:** • Approved Release Package • Updated Change Request Log • Meeting Minutes • Non-Scheduled Change Requests (Return to Step 5) • Date for initial Release Management Project Meeting	1-5 Bus Days
10	BCCM	**CREATE RELEASE PACKAGE NOTIFICATION** 1. Develop and distribute Release Notification Package via e-mail.	**INPUTS:** • Approved Release Package • Maintenance/Defect Notification (a BellSouth function exclusively – Notification provided 30 days prior to release) **OUTPUTS:** • Release Package Notification	5 Bus Days after Release Package Mtg
11	BCCM (Project Managers from each participating company)	**RELEASE MANAGEMENT AND IMPLEMENTATION** 1. Provide Project Management and Implementation of Release (See Appendix B) 2. Lead Project Manager communicates Release Management Project status to BCCM for inclusion in Enhancement Review Package	**INPUTS:** • Release Package Notification **OUTPUTS:** • Project Release Status • Implementation Date • Project Plan, WBS, Risk Assessment, Executive Summary, etc	Ongoing

Jointly Developed by the EI Change Control Sub-team comprised
of BellSouth and CLEC Representatives

5   ENHANCEMENT REVIEW

Part 1 - Enhancement Review Meeting

The Enhancement Review meeting provides the forum for reviewing and prioritizing Pending Change Requests, generating Candidate Change Requests, and submitting Candidate Change Requests for sizing. Meetings are to be held three times per year and are open to all CLECs with a maximum of 2 (two) participants from each company. Meetings will be structured according to category (pre-order, order, and maintenance) and will run in sequential sessions. A CLEC may choose to send different representatives to each of the sessions, however only 2 (two) participants will be allowed per session.

During the Enhancement Review Meeting each originator of a Change Request will be allowed 5 (five) minutes to present their Change Request. This presentation will be followed by a 15 (fifteen) minute question and answer session. After all presentations for a particular interface are complete, the prioritization process will begin.

An Enhancement Review Package containing all Change Requests to be reviewed, will be distributed 30 (thirty) calendar days prior to the Enhancement Review meeting. A Change Request must reach "P (Pending)" status 33 (thirty-three) business days prior to the distribution of the Enhancement Review Package to be placed on the agenda for the next scheduled meeting.

Part 2 - Enhancement Review Package

The Enhancement Review Package will be distributed to all participants 22 (twenty-two) business days prior to the Enhancement Review meeting. The package will include the following:

- Meeting Notice
- Agenda
- Current Approved Release Package (from process step 9) – Descriptive view by release by Electronic Interface
- List of Change Requests to be reviewed (Change Request Log)
- Copy of Electronic Interface Change Control Process or reference to it on the BST web-site (for CLECs not familiar with the process, new CLECs or CLECs that choose to participate after the initial rollout)
- Distribution List of participating CCCMs
- Preliminary Prioritization List Form (to be completed by CLEC and mailed to BCCM)

Part 3 – Prioritizing Change Requests

Prior to the Enhancement Review Meeting, each participating CLEC will receive a Preliminary Prioritization List Form. The CLEC should use this form to provide a preliminary ranking of enhancements by category, by interface. Individual rankings will be consolidated by the BCCM and handed out at the Enhancement Review Meeting. The CCCMs must send their company's prioritization list to the BCCM one week prior to the Enhancement Review Meeting.

Final prioritization will be determined at the Enhancement Review meeting after presentation of the Change Requests for each category

Prioritization Voting Rules

- Voting on an interface not used by the CLEC is prohibited
- One vote per CLEC. per interface
- Forced Ranking (1 to N, with N being the highest) will be used
- Votes will be tallied to determine order of ranking
- Enhancements will be ranked by category, by interface
- The top 3 Enhancements from each interface will be included in the Candidate Request List for sizing and sequencing with a maximum of 22 Enhancements (4 Enhancements for LENS – 2 for order and 2 for pre-order)
- In case of a tie, the affected Enhancements will be re-ranked and prioritized based on the re-ranking

Example: The top 2 Enhancements from high to low are E5 and E2, with E1 and E4 tied for 3rd. E1 and E4 would be re-ranked and prioritized according to the re-ranking.

Pre-Order LENS	CLEC 1	CLEC 2	CLEC 3	Total
E1	3	6	1	10
E2	4	2	6	12
E3	6	1	2	9
E4	2	4	4	10
E5	5	5	3	13
E6	1	3	5	9

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of BellSouth and CLEC Representatives.

6 CHANGES TO THIS PROCESS

The current, approved version of this process document will be stored under the component name "Exchgmgt3.doc". The BellSouth Electronic Interface Change Control Manager BCCM (and alternate) will be the only persons authorized to update the document version.

Requests for changes to the Change Control Process may be submitted to the BellSouth Electronic Interface Change Control Manager (BCCM) using the Change Request form located in the Appendix A. Cosmetic changes may be made and published by the BCCM (or alternate) without further review. Other changes must be reviewed and approved by the CLEC/BST Steering Committee. When approval has been obtained, the BCCM (or alternate) will update the document version.

7   TERMS AND DEFINITIONS

A

Accountability. Individual(s) having responsibility for completing and producing the outputs of each sub-process as defined in the Detailed Process Flow.

Acknowledgement Notification. Notification returned to originator by BCCM indicating receipt of Change Request.

Approved Release Package. Calendar of Candidate Change Requests with consensus target implementation dates as determined at the Release Package Meeting.

B

BellSouth Change Control Manager (BCCM). BellSouth Single Point of Contact for processing Change Requests.

BFR (Bonafide Request). Process used for providing custom products and/or services. Bonafide Requests are outside the scope of the Change Control Process and should be referred to the appropriate BellSouth Account Team.

Business Rules. The logical business requirements associated with the Electronic Interfaces referenced in this document. Business rules determine the when and the how to populate data for an Electronic Interface. Examples of data defined by Business Rules are:

- The five primary transactions sets: 850, 855, 860, 865, and 997

- Data Element Abbreviation and Definition

- Activity Types at the appropriate level (account, line, feature) and the associated Usage Type (optional, conditional, required, not applicable, prohibited)

- Conditions/rules associated with each Activity and Usage Type

    ◊ Dependencies relative to other data elements

    ◊ Conditions which will be edited within BellSouth's OSSs

- Valid Value Set

- Data Characteristics

C

Cancellation Notification. Notification returned to originator by the BCCM indicating a Change Request has been canceled for one of the following reasons: duplicate request, training issue, or failure to respond to clarification.

Candidate Request List. List of prioritized Change Requests with associated "Need by Dates" as determined at an Enhancement Review Meeting. These requests will be submitted for sizing and sequencing.

Candidate Change Request. Change Requests that have been prioritized at an Enhancement Review Meeting and are eligible for independent sizing and sequencing by BellSouth and each CLEC.

Change Request. A formal request, submitted on a Change Request Form, to add new functions or Enhancements to existing Electronic Interfaces (as identified in the scope) in a production environment.

Change Request Status. The status of a Change Request as it flows through the Change Control process as described in the Detailed Process Flow

- **A = Appeal.** Indicates a cancelled Change Request is being appealed by the originator (Step 4).

- **C = Request Cancelled.** Indicates a Change Request has been canceled due to one of the following reasons (Step 4):

  - **CC = Clarification.** Requested clarification not received in allotted time (7 days).

  - **CD = Duplicate Request.** A request for this enhancement already exists.

  - **CT = Training.** Requested enhancement already exists, additional training may be required.

- **D = Request Purge.** Indicates the cancellation of a Change Request that has been pending for 12 months and has failed to reach the Candidate Request List (Step 4).

- **ERC = Enhancement Review Complete.** Indicates a Change Request has been reviewed at an Enhancement Review Meeting, but did not reach the Candidate Request List (Step 11).

- **N = New Change Request.** Indicates a Change Request has been received by the BCCM, but has not been validated (Step 4).

- **P = Pending.** Indicates a Change Request has been accepted by the BCCM and scheduled for Enhancement Review (Step 4 moving to Step 5).

- **PC = Pending Clarification.** Indicates a Clarification Notification has been sent to the originator, BCCM awaiting response (Step 4).

- **PN = Pending N times.** Indicates a Change Request reached the Candidate Request List, was sized but not scheduled for a release and has cycled through the process N number of times. Example: P1 = 2nd time through process. P2 = 3rd time through process, etc (Step 9).

- **RC = Candidate Request.** Indicates a Change Request has completed the Enhancement Review process and been assigned to the Candidate Request List for sizing and sequencing (Step 6).

- **RSP = Request Re-Scheduled** – Step 11.

Clarification Notification. Notification returned to the originator by the BCCM indicating required information has been omitted from the Change Request and must be provided prior to acceptance of the Change Request. The Change Request will be cancelled if clarification is not received by the date indicated on the Clarification Notification.

CLEC Change Control Manager (CCCM). CLEC Single Point of Contact for processing Change Requests.

Cycle Time. The time allotted to complete each step in the Change Control Process prior to moving to the next step in the process.

D

Defect (Production). A "production defect" is a defect found in a production environment when the system is not operating as specified in a baseline business requirements document; that is, required functionality is not there.

E

Enhancement. Functions which have never been introduced into the system; improving or expanding existing functions; required functional changes to system interfaces (user and other systems), data, or business rules (processing algorithms – how a process must be performed); any change in the User Requirements in a production system.

Enhancement Review Meeting. Meeting held by the Enhancement Review participants to review and prioritize pending Change Request, generate Candidate Change Request, and submit Candidate Change Request for sizing and sequencing.

Enhancement Review Package. Package distributed by the BCCM 22 (twenty-two) business days prior to the Enhancement Review Meeting. The package includes the Meeting Notice, Agenda, Approved Release Package, Change Request Log, etc.

I

Internal Change Management Process. Internal process unique to BellSouth and each participating CLEC for managing and controlling Change Requests.

N

Need-by-Date. Date used to determine implementation of a Change Request. This date is derived at the Enhancement Review Meeting through team consensus. Example: 1Q99 or Release XX.

P

Priority. The urgency assigned for resource allocation to implement an enhancement. Priority may be initially entered by the originator of the Change Request, but may be changed by the BCCM with concurrence from the originator or the Review Meeting participants. One of four priorities may be assigned. These levels reflect the order in which the work will be performed:

> **1-Urgent.** Should be implemented as soon as possible. Resources may be pulled from scheduled release efforts to expedite this item. A need-by date will be established during the Enhancement Review Meeting. A special release may be required if the next scheduled release does not meet the agreed upon need-by date.

> **2-High.** Implement in the next possible scheduled major release, as determined during the Release Package Meeting.

> **3-Medium.** Implement in a future scheduled major release. A scheduled release will be established during the Release Package Meeting.

> **4-Low.** Implement in a future scheduled major release only after all other priorities. A scheduled release will be established during the Release Package Meeting.

Project Plan. Document which defines the strategy for Release Management and Implementation, including Scope Statement, Communication Plan, Work Breakdown Structure, etc. See Release Management Project Plan template, Attachment B-1.

R

Release – Major. Implementation of scheduled Enhancement(s) which may or may not impact all CLECs; may or may not require CLECs to make changes to their interface and may or may not prohibit the use of an interface upon implementation of the Enhancement(s). Application-to-Application and Machine-to-Human.

Release – Minor. Implementation of scheduled Enhancement(s) which do not require coordination with the entire CLEC industry, do not require CLECs to make changes to their interface or do not prohibit the use of an interface upon implementation of the Enhancement(s). Machine-to-Human.

Release Package. Package distributed by the BCCM listing the Candidate Change Requests that have been targeted for a scheduled release.

Release Package Notification. Package distributed by the BCCM and used to conduct an initial Release Management and Implementation meeting. The package includes the list of participants, meeting date, time, Approved Release Package, Maintenance/Defect Notification, etc.

S

Single Point of Contact (SPOC). Single Point of Contact within BellSouth for reporting defects to Electronic Interfaces.

Specifications. Detailed, exact document(s) describing enhancement requested and included with the Change Request as additional information.

V

Version (Document). Indicates variation of an earlier Change Control process document. Users can identify the latest version by the version control number.

APPENDIX A – CHANGE CONTROL FORMS

This section identifies the forms to be used during the initial phases of the Change Control process accompanied by a brief explanation of their use. Attachments A1 – A-4A contains sample Change Control forms and line by line Checklists.

Change Request Form. Used when submitting a request for an enhancement (Attachment A-1).

Change Request Form Checklist. Provides line-by-line instructions for completing the Change Request form (Attachment A-1A).

Change Request Clarification Response. Used when responding to request for clarification or Clarification Notification (Attachment A-2).

Change Request Clarification Checklist. Provides line-by-line instructions for completing the Change Request Clarification Response (Attachment A-2A).

Acknowledgement Notification. Advises originator of receipt of Change Request by BCCM (Attachment A-3).

Acknowledgement Notification Checklist. Provides line-by-lines instructions for completing the Acknowledgement Notification. (Attachment A-3A).

Cancellation Notification. Advises the originator of cancellation of a Change Request (Attachment A-3).

Cancellation Notification Checklist. Provides line-by-line instructions for completing the Cancellation Notification. (Attachment A-3B).

Clarification Notification. Advises originator that a Change Request is being held pending receipt of additional information (Attachment A-4).

Clarification Notification Checklist. Provides line-by-line instructions for completing the Clarification Notification. (Attachment A-4A).

Change Request Form

Internal Reference # _____(1)   Date Change Request Submitted ___/___/___(2)

☐ CLEC ☐ BST (3)   Company Name_____(4)

CCM_____(5)   Phone_____(6)

CCM Email Address _____(7)   Fax_____(8)

Alternate CCM_ _____(9)   Alternate Phone # _____(10)

Originator's Name _____(11)   Phone_____(12)

Title of Change _____(13)

Category ☐ Add New Functionality   ☐ Change Existing (14)   Desired Due Date ___/___/___(15)

Originating CCM assessment of impact ☐ Major ☐ Minor ☐ None expected (16)

Originating CCM assessment of priority ☐ Urgent ☐ High ☐ Medium ☐ Low (17)

Interfaces Impacted (18)		

☐ Pre-Ordering
  ☐ LENS
  ☐ LPOG
	☐ Ordering
	  ☐ EDI
	  ☐ LENS
	  ☐ EDI PC
		☐ Maintenance
		  ☐ TAFI
		  ☐ EC-TA Local

Type Of Change - Check one or more, as applicable (19)		
☐ Software	☐ Hardware	☐ Industry Standards
☐ Product & Services	☐ New or Revised Edits	☐ Process
☐ Documentation	☐ Regulatory	☐ Other

Description of requested change including purpose and benefit received from this change. (Use additional sheets, if necessary.) (20)

_____

_____

_____

_____

Known dependencies (21)

_____

_____

Additional Information ☐ Yes ☐ No (22)
List all business specifications and/or requirements documents included (or Internet / Standards location, if applicable)

_____

_____

_____

Change Request Form

Change Request Log # _____ (23)   Clarification ☐ Yes ☐ No (24)

Clarification Request Sent __/__/__ (25)   Clarification Response Due __/__/__ (26)

Status _____ (27)

Enhancement Review Date __/__/__ (28)   Target Implementation Date __/__/__ (29)

Last Modified By _____ (30)   Date Modified __/__/__ (31)

Review Results (32)

_____
_____
_____

Canceled Change Request ☐ Duplicate   ☐ Training   ☐ Clarification Not Received (33)

Cancellation Acknowledgment CLEC _____ BST _____ Date __/__/__ (34)

Request Appeal ☐ Yes ☐ No (35)

Appeal Considerations (36)

_____
_____
_____

Agreed Release Date __/__/__ (37)

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Change Request Form Checklist

All fields will be validated before change request is returned for clarification.

Field	Checklist	Description	Instructions	Action Required
1	Optional	Optional field for the initiator to use for internal tracking. The request may be generated prior to submission into the BellSouth EI Change Control Process.	No action	
2	Mandatory	Date Change Request sent to BCCM.	Return to sender	Date entry required
3	Mandatory	Indicate whether Change Request originated at CLEC or BST.	Return to sender	Company designation required
4	Mandatory	Enter company name for the Change Request.	Return to sender	Company name required
5	Mandatory	Enter originating company's Change Control Manager's name.	Return to sender	CCM name required
6	Mandatory	Enter originating company's Change Control Manager's phone number.	Return to sender	CCM phone number required
7	Mandatory	Enter originating company's Change Control Manager's e-mail address.	Return to sender	CCM e-mail address required
8	Mandatory	Enter originating company's CCM's fax number.	Return to sender	CCM fax number required
9	Mandatory	Enter originating company's alternate contact name.	Return to sender	Alternate contact name required
10	Mandatory	Enter originating company's alternate contact phone number.	Return to sender	Alternate contact number required
11	Optional	Optional field for the company's internal SME requesting enhancement. This field can be for internal use only or you can choose to share it.	No action	No action
12	Optional	Optional field for the company's internal SME's phone number requesting enhancement. This field can be for internal use only or you can choose to share it.	No action	No action
13	Mandatory	For the purpose of referencing the Change Request, assign a short, but descriptive name.	Return to sender	Title required – maximum length 40 char.
14	Mandatory	Identify request category for the Change Request.	Return to sender	Category required
15	Optional	Enter desired implementation due date for the proposed enhancement.	No action	No action
16	Mandatory	Identify originating company assessment of impact.	Return to sender	Entry required
17	Mandatory	Identify originating company assessment of priority.	Return to sender	Entry required
18	Mandatory	Indicate interface(s) affected by the proposed Change Request.	Return to sender	Entry required
19	Mandatory	Indicate the type of change for the request.	Return to sender	Entry required
20	Mandatory	Describe the proposed change request, indicating the purpose and benefit of request. If additional space is needed, use additional space sheet.	Return to sender	Description of change request required
21	Mandatory	Indicate any known dependencies relative to the Change Request. If none are known, enter "None known".	Return to sender	Entry required
22	Mandatory	Indicate whether additional information accompanies/supports the proposed Change Request. If yes, list all documents attached or reference where they can be found, including	Return to sender	Supporting documentation must accompany request

Field	Checklist	Description	Instructions	Action Required
		internet address and standards reference, if applicable.		
23	Mandatory BCCM	A Change Request Log Number generated by "the Change Request Logging system" upon receipt of change request. The number should be sent back to the originator on the acknowledgment receipt. This # will be used to track the Change Request, as well as any	Return to sender	Log number - system generated.
24	Conditional BCCM	Indicates whether clarification is needed on the Change Request..		
25	Conditional BCCM	Date clarification request sent to originating CCM.		
26	Conditional BCCM	Date clarification due back from originating CCM.	Return to sender	
27	Mandatory BCCM	Indicate status of proposed change request (I.e. clarification, validation, pending, etc.)		
28	Mandatory BCCM	Assign date when change request will appear on Review Board agenda.	Return to sender	
29	Mandatory BCCM	A soft date for implementation. Updated based on Candidate Release Package info.		
30	Mandatory BCCM	Field that communicates who last updated the request.		
31	Mandatory BCCM	Field that communicates when the last update occurred		
32	Mandatory BCCM	Change Request results captured from the Enhancement Review meeting.		
33	Conditional BCCM	Canceled Change Request reasoning.	Return to sender	
34	Conditional BCCM	Concurrence with Change Request originating company. Show date of concurrence.	Return to sender	
35	Conditional BCCM	Change Request Appeal indication.		
36	Conditional BCCM	Detailed description of the appeal considerations.		
37	Mandatory BCCM	Indicate agreed release date from Project Release Plan.		

Change Request Clarification Response

Log # _____(1)   Date Clarification Sent ___/___/___(2)

Internal Reference # _____(3)   Clarification Version # _____(4)

Date Change Request Submitted ___/___/___(5)

☐ CLEC   ☐ BST (6)   Company Name_____(7)

CCM_____(8)   Phone_____(9)

CCM Email Address _____(10)   Fax_____(11)

Alternate CCM _____(12)   Alternate Phone # _____(13)

Originator's Name _____(15)   Phone_____(16)

Title of Change_____(17)

Category ☐ Add New Functionality   ☐ Change Existing (18)   Desired Due Date __/__/__(14)

Originating CCM assessment of impact ☐ Major   ☐ Minor   ☐ None expected (19)

Originating CCM assessment of priority ☐ Urgent ☐ High   ☐ Medium   ☐ Low (20)

Interfaces Impacted (21)		

☐ Pre-Ordering
  ☐ LENS
  ☐ LPOG
	☐ Ordering
	  ☐ EDI
	  ☐ LENS
	  ☐ EDI PC
		☐ Maintenance
		  ☐ TAFI
		  ☐ EC-TA Local

Type Of Change - Check one or more, as applicable (22)		
☐ Software ☐ Product & Services ☐ Documentation	☐ Hardware ☐ New or Revised Edits ☐ Regulatory	☐ Industry Standards ☐ Process ☐ Other

Description of requested change including purpose and benefit received from this change. (Use additional sheets, if necessary.) (23)

_____
_____

Known dependencies (24)

_____
_____

Additional Information ☐ Yes ☐ No (25)
List all business specifications and/or requirements documents included (or Internet / Standards location, if applicable)

_____
_____
_____

Change Request Clarification Response Checklist

All fields will be validated before change request is returned for clarification.

Field	Checklist	Description	Instructions	Action Required
1	Mandatory	BellSouth Log number assigned to the original Change Request.	No action.	
2	Mandatory	Date Change Request Clarification sent to BCCM.		
3	Optional	Optional field for the initiator to use for internal tracking. The request may be generated prior to submission into the BellSouth EI Change Control Process.	No action.	
4	Mandatory	Version number for tracking clarifications.		
5	Mandatory	Date original Change Request sent to BCCM.	Return to sender	Date entry required
6	Mandatory	Indicate whether Change Request originated at CLEC or BST.	Return to sender	Company designation required
7	Mandatory	Enter company name for the Change Request.	Return to sender	Company name required
8	Mandatory	Enter originating company's Change Control Manager's name.	Return to sender	CCM name required
9	Mandatory	Enter originating company's Change Control Manager's phone number.	Return to sender	CCM phone number required
10	Mandatory	Enter originating company's Change Control Manager's e-mail address.	Return to sender	CCM e-mail address required
11	Mandatory	Enter originating company's CCM's fax number.	Return to sender	CCM fax number required
12	Mandatory	Enter originating company's alternate contact name.	Return to sender	Alternate contact name required
13	Mandatory	Enter originating company's alternate contact phone number.	Return to sender	Alternate contact number required
14	Optional	Optional field for the company's internal SME requesting enhancement. This field can be for internal use only or you can choose to share it.	No action	No action
15	Optional	Optional field for the company's internal SME's phone number requesting enhancement. This field can be for internal use only or you can choose to share it.	No action	No action
16	Mandatory	For the purpose of referencing the Change Request, assign a short, but descriptive name.	Return to sender	Title required – maximum length 40 char.
17	Mandatory	Identify request category for the Change Request.	Return to sender	Category required
18	Optional	Enter desired implementation due date for the proposed enhancement.	No action	No action
19	Mandatory	Identify originating company assessment of impact.	Return to sender	Entry required
20	Mandatory	Identify originating company assessment of priority.	Return to sender	Entry required
21	Mandatory	Indicate interface(s) affected by the proposed Change Request.	Return to sender	Entry required
22	Mandatory	Indicate the type of change for the request.	Return to sender	Entry required
23	Mandatory	Describe the proposed change request, indicating the purpose and benefit of request. If additional space is needed, use additional sheet.	Return to sender	Description of change request required
24	Mandatory	Indicate any known dependencies relative to the Change Request. If none are known, enter "None known".	Return to sender	Entry required
25	Mandatory	Indicate whether additional information	Return to	Supporting

Field	Checklist	Description	Instructions	Action Required
		accompanies/supports the proposed Change Request. If yes, list all documents attached or reference where they can be found, including internet address and standards reference, if applicable.	sender	documentation must accompany request

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Acknowledgment Notification (Sample)

1) Change Request Log #:   878
(4) Internal Reference #: ARX00000

(2) Date Change Request Submitted: 04/01/1998
(3) Date Change Request Received: 04/01/1998
(5) Date of Notification: 04/04/1998

(6) Company Name: John Doe Telephone

(7) Title of Change: Creation of new EDI transaction for jeopardy processing – 870 transaction number.

(8) Request Category: Add New Functionality

(9) Response due date: 04/08/1998

(10) BCCM Contact name_____   (11) Phone_____

Cancellation Notification (Sample)

(1) Change Request Log #:   878
(4) Internal Reference #: ARX00000

(2) Date Change Request Submitted: 04/01/1998
(3) Date Change Request Received: 04/01/1998
(5) Date of Notification: 04/04/1998

(6) Company Name: John Doe Telephone

(7) Title of Change: Creation of new EDI transaction for jeopardy processing – 870 transaction number.

(8) Cancellation Type: Duplicate Request

(9) Cancellation Acknowledgment Date: 05/15/1998

(10) Cancellation Explanation: Same functionality as Change Request RWR52434.

(11) BCCM Contact name_____   (12) Phone_____

Acknowledgment Notification Checklist

All fields will be validated prior to sending the Acknowledgment Notification.

Field	Checklist	Description	Instructions	Action Required
1	Mandatory	A Change Request Log Number generated by "the Change Request Logging system".	Return to sender	Log number - system generated.
2	Mandatory	Date Change Request sent to BCCM.	Return to sender	
3	Mandatory	Date Change Request received by BCCM.	Return to sender	
4	Optional	Optional field for the initiator to use for internal tracking. The request may be generated prior to submission into the BellSouth EI Change Control Process.	Return to sender (if used).	No action.
5	Mandatory	Date of Change Request Notification	Return to sender	Current system date/time.
6	Mandatory	Originating Company name of the Change Request.	Return to sender	
7	Mandatory	A short, but descriptive name (title) for referencing the Change Request.	Return to sender	
8	Mandatory	Identify request category for the Change Request.	Return to sender	
9	Mandatory	Response due date.	Return to sender	
10	Mandatory	BCCM Contact Name.	Return to sender	
11	Mandatory	BCCM Contact Phone Number	Return to sender	

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Cancellation Notification Checklist

All fields will be validated prior to sending the Cancellation Notification.

Field	Checklist	Description	Instructions	Action Required
1	Mandatory	A Change Request Log Number generated by "the Change Request Logging system".	Return to sender	Log number - system generated.
2	Mandatory	Date Change Request sent to BCCM.	Return to sender	
3	Mandatory	Date Change Request received by BCCM.	Return to sender	
4	Optional	Optional field for the initiator to use for internal tracking. The request may be generated prior to submission into the BellSouth EI Change Control Process.	Return to sender (if used).	No action.
5	Mandatory	Date of Change Request Notification	Return to sender	Current system date/time.
6	Mandatory	Originating Company name of the Change Request.	Return to sender	
7	Mandatory	A short, but descriptive name (title) for referencing the Change Request.	Return to sender	
8	Mandatory	Canceled Change Request reasoning.	Return to sender	
9	Mandatory	Cancellation Acknowledgment Date	Return to sender	
10	Mandatory	BCCM Contact Name.	Return to sender	
11	Mandatory	BCCM Contact Phone Number	Return to sender	

Clarification Notification (Sample)

(1) Change Request Log #:   878   (2) Date Change Request Submitted: 04/01/1998
                                           (3) Date Change Request Received: 04/01/1998

(4) Internal Reference #: ARX00000   (5) Date of Notification: 04/04/1998

(6) Company Name: John Doe Telephone

(7) Title of Change: Creation of new EDI transaction for jeopardy processing – 870 transaction number.

(8) Request Category: Add New Functionality

(9)[1] Please Clarify:
- ☐ Date Change Request Submitted (2)
- ☐ Company Name (4)
- ☐ CCM Phone (6)
- ☐ Fax (8)
- ☐ Alternate Phone (10)
- ☐ Category (14)
- ☐ Priority (17)
- ☐ Type of Change (19)
- ☐ Known dependencies (21)

- ☐ CLEC or BST (3)
- ☐ CCM (5)
- ☐ CCM E-mail (7)
- ☐ Alternate CCM (9)
- ☐ Title of Change (13)
- ☐ Assessment of Impact (16)
- ☐ Interfaces affected (18)
- ☐ Description (20)
- ☐ Additional Information (22)

(10) Response due by: 04/08/1998

(11) BCCM Contact name_____ (12) Phone_____

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[1] The individual field references correspond directly to the Change Request Form.

Jointly Developed by the EI Change Control Sub-team comprised

Clarification Notification Checklist

Field	Checklist	Description	Instructions	Action Required
1	Mandatory	A Change Request Log Number generated by "the Change Request Logging system".	Return to sender	Log number - system generated.
2	Mandatory	Date Change Request sent to BCCM.	Return to sender	
3	Mandatory	Date Change Request received by BCCM.	Return to sender	
4	Optional	Optional field for the initiator to use for internal tracking. The request may be generated prior to submission into the BellSouth EI Change Control Process.	Return to sender (if used).	No action
5	Mandatory	Date of Change Request Notification.	Return to sender	Default to current system date/time.
6	Mandatory	Originating Company name of the Change Request.	Return to sender	
7	Mandatory	A short, but descriptive name (title) for referencing the Change Request.	Return to sender	
8	Mandatory	Request Category	Return to sender	
9	Mandatory	Clarification Considerations - Numbers in parentheses refer to corresponding fields on the Change Request Form.	Return to sender	
10	Mandatory	Response due by date.	Return to sender	
11	Mandatory	BCCM Contact Name.	Return to sender	Default to BCCM.
12	Mandatory	BCCM Contact Phone Number	Return to sender	Default to BCCM Number.

APPENDIX B – RELEASE MANAGEMENT

Release Management and Project Implementation is described in Step 11 of the Change Control Process. Project Mangers are responsible for confirming the release date, developing project plans and requirements, providing the WBS, Gantt chart and Executive Summary to the BCCM for input to the Enhancement Review Package and ensuring the successful implementation of the release.

The BST Change Control Manager (BCCM) will distribute the Release Notification Information via email. The Notification should contain the following information:

- List of participants (Project Managers from each stakeholder)

- Date(s) for the next Project Manage Release meeting(s)

- Times

- Logistics

- Meeting facilitator and minutes originator (rotated between stakeholders)

- Current Approved Release Package (email attachment)

- Current Maintenance/Defect Notification Information (email attachment)

- Draft Release Project Plan - WBS (email attachment created by the Lead Project Manager (s) assigned in step 9 of the Change Control Process)

- Lead Project Manager (s) assigned to the Release with reach numbers (s)

Attachments B1 – B12 contain templates designed to assist the Project Manager(s) in conducting project management responsibilities as needed for Release Management and Implementation.

Release Management Project Plan Template

Document Preparation Information

PROJECT NAME - RELEASE NUMBER	PREPARED BY (PRINT)	SIGNATURE	DATE PREPARED

Scope Statement

The project scope defines the boundaries by which the project will operate. The scope statement will be used to obtain agreement and approval from the customers and stakeholders for the project funding.

See Scope Statement Template

Communication Plan

The project team will determine the type and frequency of communications that must take place during the project life cycle to enable the project's success. The table below outlines the agreed to communication vehicles.

Status Communiqué	Distribution	Frequency	Owner
Project Release Status Report	• Team Members • Enhancement Review Team	• Weekly • Monthly	Project Manager
Team Member To Do List	• Team Member	• Weekly	Project Manager
Executive Summary	• Project Sponsor	• Monthly	Project Manager
Status Meeting/Minutes	• Team Members	• Weekly	Project Manager

All escalations will be communicated by the project manager to the project sponsor.

See Project Release Status Report
See CCP To Do List/Resource (part of Microsoft Project file - Custom Report)
See CCP To Do List/Dates (part of Microsoft Project file - Custom Report)

Project Tracking Plan

Project tracking and control is the process whereby the project manager determines the degree to which the project plan is being met. The focus is on the schedule, budget and resource allocations.

The project manager will hold regularly scheduled team meetings for the purpose of updating the Work Breakdown Schedule (WBS) with accurate information. During these meetings, all new issues will be raised and assigned to an owner for resolution. All existing issues will be reviewed for current status and/or closure.

Other documents to be updated during the team meetings are as follows:

- Change Control Plans
- Risk Management Plans
- Communication Plans
- Scope Statements
- Team Roster and Responsibilities

Project status will be created and distributed as defined in the Communications Plan.

Work Breakdown Structure

The project manager will develop a Work Breakdown Structure (WBS) in the appropriate project management software application, including tasks, durations, start/end dates, dependencies, personnel resources, and related costs. A draft version of the WBS will be created by the project manager and reviewed with the project team in an effort to effectively utilize the team's time. The WBS will be revised and agreed to by the entire team to facilitate activity ownership and commitment.

While creating the WBS, the team should consider all resource, time, budget and performance constraints associated with the project.

See WBS Template (part of Microsoft Project file - Gantt View)

Roles and Responsibilities

Project roles will be defined to clearly identify expectations among project participants. Update the table below with the correct project roles and responsibilities.

ROLES	RESPONSIBILITIES
Project Manager	Identify Preliminary Resources
	Hold Kick-off Meeting
	Develop Project Plan Documents
	Track Project Status
	Time
	Cost
	Manage Change Control
	Manage Issues
	Communicate Project Status
Project Sponsor	Understand Current Project Status
	Single Point of Contact for Escalations
	Communicate Project Status
	Define/Approve Milestone Exit Criteria
Stakeholder	Provide Team Members / External Project Support
	Understand Current Project Status
	Define Milestone Exit Criteria
External Project Support	Perform Agreed to Activities as Defined
	Provide Project Manager Status
Team Members	Attend Project Team Meetings
	Perform Agreed to Activities as Defined
	Provide Project Manager Status

Project Team Roster

A list of all parties associated with or impacted by the project should be documented and distributed to the team.

See Project Team Roster

Risk Management Plan

In an effort to mitigate possible negative impacts to the project, a high-level risk assessment should be performed during the initial phase of the project. For each high-level risk, the team should develop a mitigation strategy or position. As potential risks are identified during the project life cycle, the team should again develop a mitigation strategy or position.